

J.P. Morgan E-Tax

Innovation for global investing

J.P. Morgan Worldwide Securities Services offers a Web-based tax intelligence product that provides clients the tax intelligence tools needed when investing globally. The solution to cross-border taxation needs is just a click away, powered by a network of knowledgeable tax professionals with substantial tax resources provided through the strength of our firm.

BENEFITS AND FEATURES

Benefit	Features
Key Features and Benefits	<ul style="list-style-type: none"> J.P. Morgan E-Tax provides a single convenient data source designed with our clients in mind. E-Tax search capability allows clients to review the entire tax database, including extensive daily flashes, newsletters and market reports, in seconds. Profiles are updated daily for all investor types to meet the needs of tax professionals, operations departments and investment managers.
Market Intelligence	<ul style="list-style-type: none"> International tax news is provided on over 90 markets. Clients can locate current and historical tax information and market reports, with in-depth studies on each country covered, as well as statutory and transaction tax information, including dividends, interest, capital gains, as well as all statutory exceptions and new information pertaining to the taxation of REITs. Tax market reports feature treaty information and market characteristics of tax relief, documentation requirements and procedures. Tax concepts specific to a particular country are discussed in detail, in addition to a detailed international tax form library.
Solutions Driven	<ul style="list-style-type: none"> E-Tax meets the varied needs of tax professionals, operations departments and investment managers. Investment managers can access J.P. Morgan E-Tax to assist in investment decisions based on current tax considerations; for example, to determine potential portfolio implications of proposed tax changes and capital gains. Operations departments can access J.P. Morgan E-Tax tax rate profiles that are refreshed daily, which can be used to support and validate their own sources and internal tax systems. Tax professionals can access E-Tax for tax research purposes, obtaining statutory tax information in addition to describing real work consideration where other variables impact actual tax processes.

Highlights

The J.P. Morgan E-Tax client tool kit is interactive and provides unique data views to help out clients including:

- Up-to-date global profiles reflecting international tax rates for client specified tax structures. These tax profiles are automatically updated daily and display the dividend, interest, and capital gains tax rates that the client would incur. Profiles also provide tax reclaim forms that are specific to the profile entered. Profiles are downloadable to Excel/CSV spreadsheets for client's own internal system use.
- Transaction tax calculator which allows clients to understand the taxes and fees they would incur on their global equity transactions.
- Investor Tax Kits, which provide forms and instructions needed to open an account in a new market. This eliminates guesswork as to the account opening procedure, and assures that our clients will complete real-time forms.
- E-Tax's "External Websites" is a quick and easy reference tool to access government tax websites as well as other important tax-related websites and tax treaties.
- Added functionality includes training modules, messages and alerts, as well as print and downloading capabilities.

To learn more, speak to your representative, or visit us at jpmorgan.com/wss.